The Public Wi-Fi in Asia Pacific: usage trends, business models and monetisation strategies

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Synopsis

Wi-Fi continues to be a popular wireless service in Asia–Pacific and it can affect, and be affected by, 4G roll-outs depending on mobile operator pricing and market strategies.

This Viewpoint provides insights into public (not home or office) Wi-Fi data traffic trends in the Asia–Pacific (APAC) region overall and at a country level. It also provides an overview of public Wi-Fi business models, and suggests innovative ways to monetise public Wi-Fi networks for mobile network operators (MNOs) in the APAC region.

The Viewpoint answers the following key questions:

- How is public Wi-Fi used in different countries in APAC and what are the data trends?
- How consumer online behavior is impacted by Wi-Fi and LTE services?
- What are the main Wi-Fi business models and revenue generation methods?
- How can operators ensure that their Wi-Fi investments remain relevant and valuable?
- It is accompanied by an Excel file that features details of the Wi-Fi offerings of the major operators, and the scale of public Wi-Fi deployments in developed Asia–Pacific (DVAP) countries.

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Executive summary
Recommendations: How to ensure that Wi-Fi deployments remain relevant and valuable
The volume of private Wi-Fi and mobile data dwarfs that of public Wi-Fi data, but public Wi-Fi can act as a companion to mobile networks
Few countries have high levels of public Wi-Fi offloading – the reasons are different for each country
MNOs can exert control over public Wi-Fi use with pricing and data quota strategies, but depend on good Wi-Fi availability as well
China is exceptional in terms of Wi-Fi usage – public Wi-Fi data traffic far exceeds that of mobile data, but LTE is reversing this trend
Government initiatives, such as Wireless@SG in Singapore, and incumbent operators, such as in Hong Kong, can drive public Wi-Fi usage

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The volume of traffic offloaded onto public Wi-Fi is low even in developed markets with high volumes of mobile traffic and strong Wi-Fi coverage
Consumer behaviour in relation to Wi-Fi may change as LTE becomes more pervasive, but Wi-Fi remains a popular service

Deploying Wi-Fi can address several challenges that MNOs face on their cellular networks
Pervasive LTE affects only one of the four main types of Wi-Fi business model: proactive public Wi-Fi deployment
Operators in Asia–Pacific use multiple methods to generate Wi-Fi revenue – there is no single opportunity
Operators in developed markets mostly use bundling to monetise Wi-Fi, but other opportunities are available
Proactive Wi-Fi operators should explore new revenue streams to combat the risk of declining public Wi-Fi traffic and revenue
About the authors and Analysys Mason

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Related Market Reports

The HetNet Bible (Small Cells, Carrier WiFi, DAS & C-RAN): 2014 – 2020 – Opportunities, Challenges, Strategies, & Forecasts

Driven by in-building wireless coverage requirements and the growing influx of mobile broadband data traffic, a traditional macrocell based cellular network deployment is not deemed to be a sufficient solution to address the coverage and capacity needs of today's wireless subscribers.

Wireless carriers are thus exploring options to offload additional coverage and capacity to alternatives such as strategically deployed small cells and Wi-Fi access points, which have so far been deployed by more than 200 global wireless carriers. Adding further to the heterogeneity are alternative deployment models such as DAS (Distributed Antenna Systems) and the emerging C-RAN (Cloud Radio Access Networks) architecture which concentrates the processing of the RAN segment of a mobile network in one or more, centralized data centers.

Public Wi-Fi worldwide: opportunities and strategies for mobile operators in the age of pervasive LTE

The importance of public Wi-Fi might decrease as LTE adoption grows, so mobile operators should explore new ways to ensure that their public Wi-Fi investment remains relevant and provides financial benefits.

This Viewpoint provides analysis and insights on public Wi-Fi data traffic trends, consumer behaviour and business models. It suggests new opportunities and strategies to maximize public Wi-Fi monetisation, which will come under more pressure as LTE penetration increases.

This Viewpoint:

- Analyses the role and importance of public Wi-Fi in light of mobile network operators (MNOs) commercializing, implementing and monetising LTE
- Provides insights into public Wi-Fi traffic trends worldwide and particularly focuses on some of the key countries
- Looks at consumer behaviour around public Wi-Fi
- Examines public Wi-Fi business models for MNOs
- Suggests innovative ways to monetise public Wi-Fi networks.

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